



Use Your Inbox and Delegations

Your Inbox includes notifications of tasks, approvals, due dates, and other items sent to you as part of your organization's business processes. You can access your Inbox using your desktop/web browser or mobile device.

 Delegations are available only to employees (no students).

For specific instructions on approvals and process status, please review the job aid "[Approvals in Workday](#)"

 Depending on your [notification preferences](#), students, faculty, and staff will receive important emails with [ACTION REQUIRED] or [WORKDAY] in the subject line when certain required tasks or important notices become available in Workday.

On this Job Aid:

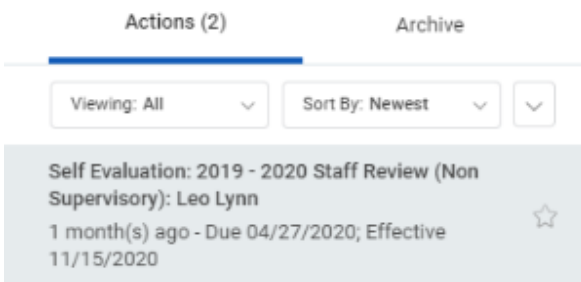
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Desktop

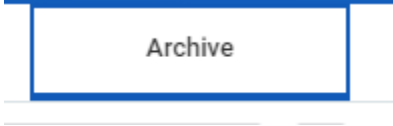
View Your Inbox



1. Click the **My Tasks Inbox** icon near your Profile icon.
2. Click the **Actions** tab to view your business process tasks, approvals, and to-dos.



3. Click the **Archive** tab to access the status of any business process in which you have been involved.

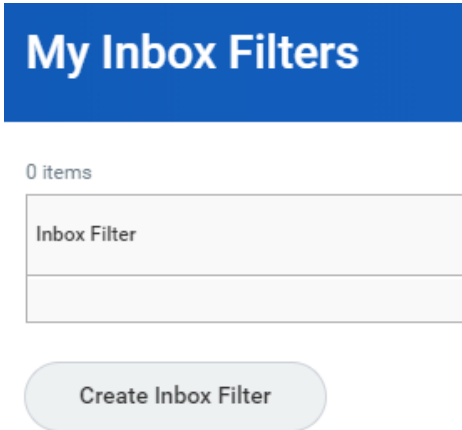


Create Inbox Filter

1. From the Workday Homepage, click on the Inbox in the top right corner.
2. Click the arrow down under Viewing All. Select Edit Filters

blocked URL

3. Click Create Inbox Filter



4. Enter Parameters for your filter. Click OK, Done.

 The "Create Inbox Filter" page shows fields for "Inbox Filter" (empty), "Description" (Expense Reports), and "Maximum Row Limit" (200). Under "View Definition", "Business Process Type(s)" is selected with "Expense Report Event" chosen. The "Task(s)" field is empty. At the bottom, a table for "Conditions" is shown with columns: And/Or, (, *Source External Field, *Relational Operator, Comparison Type, Comparison Value,), and Order. The table currently contains no data.

Delegate Your Inbox



- Delegations are not available to students.
- Delegations are temporary reassignments of tasks to another user, enabling that user to perform individual actions on your behalf.
- All requests to delegate will go through a manager for approval.
- You should delegate specific business processes from your Inbox, for a specified period of time.
- Workday also enables you to delegate the Initiating Action of business processes (i.e., a VP can delegate the ability to create expense reports to their executive assistant).
- Delegation does not confer access to view your personal information.
- Delegating an approval task does not absolve the person delegating the task of their responsibilities. They are still accountable for the delegate's actions as it related to the delegated task.

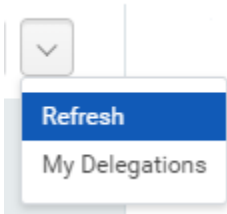
- Delegates will start receiving the delegated tasks only when new transactions are initiated. Any transactions already initiated will continue to flow to the original user.
- Attach any supporting files, such as an email message accompanying the requested delegation change, to be included as part of the business process event.
- Both you and either the delegate or the alternate delegate receive confirmation notifications when the delegations go into effect.
- Delegates can also request reassignment for any delegated tasks, but they cannot delegate any delegated tasks to another worker.
- Any delegated tasks will be recorded in the Process History with the words “On Behalf of”, followed by the name of the delegator.

Workday allows you to delegate your Inbox items to a colleague if you are unable to perform the actions yourself due to time off or a leave of absence.

i Please monitor your delegations for staff changes and end dates. Delegations will disappear from your list once they expire. Make sure you extend delegations by changing the end date into a future date.

From the Actions tab:

1. Click the **Inbox** icon near your Profile icon. 
2. Click the **More**  icon, then **My Delegations**.





3. Click **Manage Delegations**.

Manage Delegations

4. Enter the Begin Date and End Date for the delegation.

New Delegation 1 item

+	*Begin Date	End Date
-	03 / 30 / 2020 	04 / 03 / 2020 

5. Select a user to delegate your tasks to in the Delegate field.

***Delegate**

Search	⋮
Peers	>
Superiors	>
Subordinates	>

Note

If you are only delegating Inbox tasks, leave the Start On My Behalf field blank. This option is for delegating the initiation of business processes.

6. You can delegate business process you initiate on the field Start on my behalf. **For Expense Reports, Select Create Expense Report.**

Start On My Behalf

Search	⋮
By Business Process Type	>
All	>

7. In the Do Inbox Tasks On My Behalf field, select specific business processes, or none of the above. We do not recommend to select "all business process".

Do Inbox Tasks On My Behalf

☒ For all Business Processes
☐ For Business Process [Redacted] ⋮
☐ None of the above

Retain Access to Delegated Tasks in Inbox

☒

Delegation Rule

[Redacted] ⋮

8. Select the **Retain Access to Delegated Tasks in Inbox** checkbox to view and modify your Inbox while delegated.
9. Select a Delegation Rule if you are delegating a business process.
10. Enter any comment if you want to create a note to document your delegation (e.g., vacation "date")
11. Click **Submit**. A confirmation displays.
12. Click **Done**. Delegations will be routed to your manager for approval.

Note

Select the Business Processes Allowed for Delegation tab from your My Delegations page to view which business processes you can delegate.

Common tasks to delegate:

Start on my Behalf

Start On My Behalf

⋮

Function	Initiate Field	Business Process Type	Selection	Description
Procurement	Start On My Behalf	Expenses	Create Expense Report	Use this option to delegate creating expense reports on your behalf (both personal and Lynn T-EXP travel expense (brown) card).
Procurement	Start On My Behalf	Expenses	Create Spend Authorization	Use this option to delegate creating Spend Authorizations (estimated costs to be reimbursed to the employee and cash advances).

For Business Process (inbox tasks)

For Business Process

⋮

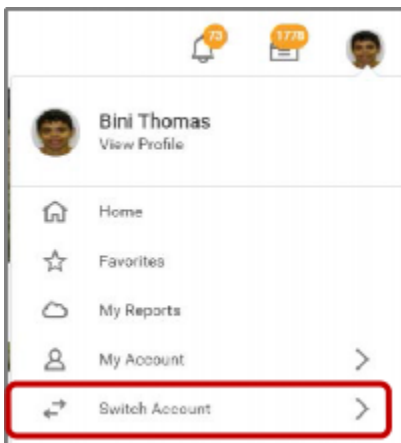
Function	Do Inbox Tasks Field	Selection	Description

Procurement	For Business Process	Expense Report Event	Use this option to delegate reviewing/approving expense request (inbox item) for regular and Lynn travel card expenses.
Procurement	For Business Process	Procurement Card Transaction Verification	Use this option to delegate reviewing/approving procurement card transactions verification (inbox item) Lynn JPM procurement P-Card (black card) expenses.
Procurement	For Business Process	Requisition Even	Approve Requisitions or changes in requisitions
Time and Attendance	For Business Process	Correct Time Off	Use this option to delegate correcting time off (inbox item)
Time and Attendance	For Business Process	Request time Off	Use this option to delegate approving absence/time off requests (inbox item)
Time and Attendance	For Business Process	Update Time Off Requests	Use this option to delegate updating absence/time off requests (inbox item)
Time and Attendance	For Business Process	Enter Time	Use this option to delegate entering time requests (inbox item)

Acting on Behalf of Another User

You are assigned to be a delegate by a co-worker to perform approval tasks on their behalf. Follow the instructions below to act on their behalf:

1. On your profile menu, click **Switch Account** to switch to the delegated account.

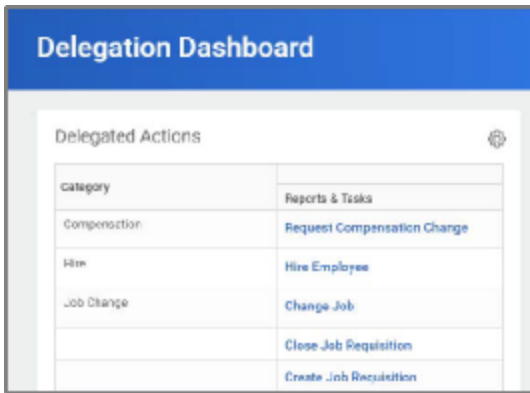


2. Click the user for whom you are a delegate.

Note

Switching accounts brings up the delegation dashboard with delegated actions. From here, you can initiate business processes that have been delegated to you by your co-worker.

- Users can initiate tasks by clicking on actions under **Reports & Tasks**.



- To switch to your personal Workday account, click the **Switch Account** and click your own name.

To view the Inbox that is delegated to you by your co-worker:

- After switching to the delegated Inbox, click the Inbox icon, and you can see your co-worker's delegated Inbox.




Mobile

View Your Inbox

The Inbox is your personal activity stream. It includes Actions (e.g., approvals, to dos) sent to you by your organization's business processes.

iPhone or iPad

- Tap the **Inbox** icon. 
- Tap the **Actions** or **Archive** tab to access the corresponding information. You can filter Actions by tapping the filter
- Select an item to view more details.

Delegate Your Inbox

Workday allows you to delegate your Inbox items to a colleague if you are unable to perform the actions yourself due to time off or a leave of absence.

Note

You can only delegate Inbox items on a task-by-task basis using the Workday Mobile application. To delegate all Inbox items within a specific time frame, you must use Workday on a web browser.

Issues - Cannot see inbox items after delegations

Make sure you check the box to “Retain Access to Delegated Tasks” for business processes. If you leave the box unchecked, **only** your delegate will have access to those items and they will not show on your inbox.

If you would like to see those items on your inbox, go to your delegation and click the “Retain Access to Delegates Tasks in Inbox” Under Do inbox Tasks.

The screenshot shows the 'Do Inbox Tasks On My Behalf' settings panel. It has a light blue background and a white header bar with the title 'Do Inbox Tasks On My Behalf'. Below the header, there are three radio button options: 'For all Business Processes' (selected with a blue dot), 'For Business Process' (highlighted with a yellow rectangle), and 'None of the above'. Below these options is a section titled 'Retain Access to Delegated Tasks in Inbox' with a yellow rectangle next to the checkbox. At the bottom, there is a 'Delegation Rule' section with a white text input field and a small icon to its right.